Tax Advisory Services at Helios Global

Helios Global is a chartered accountancy firm with **over 35 years experience** advising companies on tax and related matters[1]. Its **Tax Advisory** practice is organized into three main categories: **Registration Services**, **Direct Taxation**, and **Indirect Taxation**. Each area addresses specific compliance needs and strategic planning to minimize tax liability while ensuring full regulatory compliance.

Registration Services

- **PAN Application:** Helios assists clients in obtaining a PAN (Permanent Account Number), the mandatory 10- digit tax identifier in India. The firm guides taxpayers through the entire PAN application process – from form selection (Form 49A or 49AA) to documentation and submission – to ensure swift issuance of the PAN[2].
- **TAN Application:** Helios helps businesses apply for TAN (Tax Deduction and Collection Account Number) using the required Form 49B and documentary checklist. (TAN is required for entities that deduct or collect tax at source.) The process involves verifying eligibility, preparing the application, and interacting with the NSDL portal or income tax department on the client's behalf.
- **GST Registration:** Helios provides **GST registration services**, helping businesses register for Goods and Services Tax once turnover exceeds the prescribed threshold[3]. According to Helios, these services "help you to get your business GST registered and obtain your GSTIN"[3]. The firm guides clients through eligibility assessment, form filing (e.g. GST REG-01), and document submission. It also advises on state-wise registrations, HSN/SAC code classification, and deadlines. Helios emphasizes that it can "guide you through the entire process of GST filing, from eligibility criteria to documentation requirements to filing returns," delivering "comprehensive and customized solutions" for clients' GST needs[4][5].

Direct Taxation

- **Corporate Tax Return Preparation:** Helios prepares and files **corporate income tax returns** for companies, LLCs, partnerships and other entities. They handle all compliance – ensuring returns are accurate under income tax law, GST and other regulations. Key services include:
- *Return Filing:* Preparing and filing returns for C-Corps, S-Corps, LLCs, partnerships and other entities, ensuring compliance with Income Tax, GST and related laws[6].
- *Tax Planning:* Advising on deductions, credits and optimal tax structures to minimize liability[6][7].
- *Quarterly Payments & Integration:* Calculating quarterly advance tax installments and reconciling tax returns with financial statements[8]. Helios notes that its consultants have *"experience in corporate return preparation for every type of*

business" across industries such as consulting, eLearning, insurance, legal, and agriculture[9]. By leveraging this expertise, Helios helps simplify clients' tax processes, reduce liabilities and ensure accuracy[10][9].

- **Individual Tax Return Preparation:** Helios assists individuals and small businesses with income tax returns. The firm guides clients through document gathering, ITR form selection, income declaration, claiming exemptions/deductions, and electronic filing steps[11][12]. As Helios explains, it *"guides you through the entire process of income tax filing, from eligibility criteria to documentation requirements to filing returns"*[12]. This ensures salaried employees, freelancers, and sole proprietors comply with the latest tax rules and deadlines, maximizing refunds and minimizing tax due.

- **Expatriate Taxation:** For employees or businesses with foreign assignments, Helios offers **expat tax services**. This covers determining tax residency status, handling double taxation issues, and complying with both home- country and host- country tax laws. Services include:

- Tax Residency and Double-Tax Relief (leveraging tax treaties and foreign tax credits).
- **Worldwide Income Compliance:** Ensuring global income and allowances (including U.S. Foreign Earned Income Exclusion where applicable) are properly reported[13][14].
- **Social Security & Payroll:** Managing cross-border social security liabilities and payroll processing.
- **Expat Benefits & Reporting:** Advising on housing/relocation allowances, fringe benefits and mandatory disclosures (e.g. FBAR/FATCA for U.S. citizens)[15].
- **Retirement and Exit Planning:** Handling foreign pension taxation, exit tax and estate considerations.
  Helios stresses that its expat tax team has *"considerable experience in delivering personalized, effective, and compliant tax solutions"*, helping clients maximize treaty benefits and avoid double taxation[16][17].

- **Transfer Pricing Compliance:** Helios helps multinational companies comply with **transfer pricing** rules. Key offerings include:

- *Documentation:* Preparing robust transfer pricing reports and benchmarking studies as per OECD guidelines[18].
- *Strategic Planning:* Developing intercompany pricing policies to align with business goals and minimize adjustments[19].
- *Country-by-Country Reporting:* Assistance with global reporting requirements.
- *Risk Assessment:* Identifying and mitigating transfer pricing risk exposure[20].
- *Advance Pricing Agreements (APAs):* Supporting clients in negotiating APAs with tax authorities[21].

- *Dispute Support:* Defending pricing policies in audits or litigation[22].
  Helios notes that its transfer pricing specialists have deep expertise and global reach, ensuring compliance with international tax rules[18][23].

- **Tax Audits:** Helios prepares clients for statutory **tax audits** mandated under Section 44AB of the Income Tax Act. A tax audit is *"an examination or review of accounts of any business…from an income tax viewpoint"*[24]. Helios explains that the audit's goals are to verify correct accounting, detect irregularities, and ensure disclosure of relevant information[24][25]. The firm assists in maintaining proper books, reconciling records, and responding to auditor inquiries. Clients are advised to have Helios coordinate with auditors, address queries, and implement recommended changes – ultimately minimizing penalties[25][26].

- **Tax Planning:** Helios provides proactive **tax planning** for individuals and businesses. This involves analyzing the client's finances to legally minimize taxes. Services include:

- *Individual Planning:* Personalized strategies for employees, freelancers and entrepreneurs to optimize their tax profiles[27].
- *Business Planning:* Structuring transactions and deductions for companies to reduce tax burden and maximize legal benefits[7].
- *Estate & Succession Planning:* Advising on transfer of wealth and minimizing inheritance taxes[28].
- *Compliance & Efficiency:* Guiding proper filing, claiming eligible exemptions, and identifying tax-efficient investments and contributions[29].
  Helios highlights that effective planning can *"minimize tax liability"* and ensure clients pay only what is due under the law[30][31].

- **Transaction Advisory Services:** When clients engage in major transactions (mergers, acquisitions, divestitures, etc.), Helios offers **transaction advisory** to maximize value and manage tax implications. This includes:

- **Due Diligence:** Financial, tax and legal review to uncover risks and opportunities[32].
- **Valuation:** Determining fair value of businesses or assets using robust methodologies[33].
- **Deal Structuring:** Designing tax-efficient transaction structures aligned with strategic goals[34].
- **Transaction Tax Advisory:** Planning to optimize tax outcomes across jurisdictions (e.g. asset vs. share purchases)[35].
- **Financial Modeling:** Building models to project deal outcomes and synergies[36].
- **Post-Merger Integration:** Assisting with integration of systems, accounts and processes to realize synergies[37].
  Helios emphasizes its track record and global expertise in this space, offering

confidentiality and customized advice to achieve clients' strategic objectives[38][39].

- **Tax Litigation (Direct):** If disputes arise under direct tax laws, Helios provides litigation support and representation. Its **Tax Litigation Services** for income tax matters include:

- Representation during income tax assessments, appeals and tribunals.
- Handling negotiations, settlements and appeals (e.g. before Income Tax Appellate Tribunal or High Court).
- Legal advocacy for contentious issues such as transfer pricing disputes or Section 201 notices.
  The firm's team includes experienced tax lawyers who offer strategic defense and aim for favorable outcomes[40][41]. They maintain confidentiality and a client- centric approach while leveraging Helios's proven success record in tax disputes[42][43].

- **Advance Rulings, MAPs and APAs:** Helios advises clients on obtaining **Advance Tax Rulings**, **Mutual Agreement Procedures (MAPs)** and **Advance Pricing Agreements (APAs)** to gain certainty on cross-border tax issues[44]. Its experts help businesses interpret complex tax provisions and engage with tax authorities globally. Services include preparing submissions for advance rulings, negotiating APAs to avoid double taxation, and using MAPs under tax treaties to resolve international disputes.

- **Lower Withholding Tax Certificates:** For cross-border payments (such as dividends, interest or royalties), Helios assists in obtaining **lower withholding tax certificates** under India's tax treaties. This involves analyzing treaty eligibility, preparing applications, and coordinating with tax authorities to reduce withholding tax rates[45].

- **Attestation & Certification Services:** Helios provides attestation of tax-related documents and financial statements to meet legal requirements[46]. Its experts review and certify GST/VAT returns, TDS/TCS compliance, and financial filings to ensure "complete accuracy" and regulatory compliance[47]. This gives clients confidence that their filings are reliable and audit-ready.

Indirect Taxation

- **GST Return Preparation:** Helios helps GST-registered businesses file all required returns (such as GSTR- 1 and GSTR- 3B) accurately and on time. It guides clients on maintaining records of sales, purchases and taxes, claiming input tax credits, reconciling filings, and making payments[48][49]. In Helios's words, it can "guide you through the entire process of GST filing… to ensure that you comply with the latest rules and regulations"[5]. This service ensures businesses meet periodic return deadlines and maximize allowable credits.

- **GST Advisory Services:** Helios offers ongoing advisory on indirect tax laws. This includes:

- Advising on GST registration requirements, place of supply rules, HSN/SAC code classification, and applicable tax rates[50][51].
- Reviewing business models for tax efficiency, including valuation of related-party transactions[52].
- Ensuring clients claim proper input tax credits and comply with reverse-charge mechanisms and e- invoicing rules[51].
- Assisting with quarterly/annual filings across all registered states or branches[53].
  Helios positions itself as a partner *"from eligibility criteria to documentation requirements to filing returns,"* emphasizing quality service and compliance[54].

- **GST Audit:** The firm explains that a GST audit is an inspection mandated (for businesses above turnover thresholds) to verify GST compliance. Helios's role is to prepare clients for these audits: reviewing their books, verifying filings, and correcting discrepancies[55]. It educates taxpayers about audit triggers (e.g. turnover limits) and required documentation, so businesses can avoid penalties. Helios's team helps gather records, respond to auditor queries, and rectify any issues identified. As Helios notes, *"GST audit plays a crucial role in ensuring transparency, compliance, and accountability"*[56], and it offers to guide clients through the entire filing and audit process[57].

- **VAT & Service Tax Proceedings:** Helios continues to support clients with legacy indirect tax matters. Its professionals can assist with **VAT (Value-Added Tax)** or **Service Tax** assessments and appeals. This involves explaining the historical procedures (e.g. return filings, audits, notices)[58][59], helping clients respond to assessments, and representing them in disputes under the old regime. By maintaining records and guiding through the appeals process, Helios ensures clients minimize liabilities and comply with any carry-forward obligations[60][61].

- **GST E- Invoicing:** Helios helps businesses adapt to the government's e-invoicing system. It explains that e-invoices (standardized, IRP- validated invoices) improve compliance and reduce errors[62]. Helios advises companies above the turnover threshold how to integrate their accounting systems with the IRP and ensure invoices meet the prescribed format. The firm highlights benefits such as *"improved compliance," "cost savings,"* and faster input tax credit processing[63]. Its experts ensure clients' processes and software are compatible with e-invoicing requirements[64].

- **GST Refunds:** Helios assists clients in claiming **GST refunds** when excess input taxes have been paid. It clarifies that refunds (for accumulated ITC, exports, inverted duty structures, etc.) restore cash flow to businesses[65]. Helios guides taxpayers through the online refund application process, documentation, and follow-up with authorities[66]. It emphasizes the cash-flow benefits of timely

refunds – for example, providing liquidity for operations and making exports more competitive[67]. Clients are advised on eligibility criteria and strategies to expedite approvals.

- **GST Impact Assessments:** Helios provides analysis on how GST reforms affect various sectors. While not a compliance service per se, Helios has published studies on GST's impact (e.g. noting that replacing multiple taxes with a unified GST system simplifies compliance and boosts growth[68]). Such insights help clients understand the broader tax environment and adjust their strategies accordingly.

Each of these services is backed by Helios's emphasis on **experience and accuracy**. The firm's tax specialists stay current with changing laws and tailor advice to each client's situation[47][68]. By engaging Helios's Tax Advisory team, businesses gain a partner that manages registrations, filings, audits and disputes – ensuring full compliance and helping to **minimize tax burdens** wherever legally possible[10][69].

Sources: Descriptions and service details are drawn from Helios Global's official service pages on Tax Advisory – specifically, the sections on Registration Services, Direct Taxation, and Indirect Taxation (Helios Global).

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